eGrants Interface

The Corporation for National and Community Service's (CNCS's) eGrants Gateway is used by CNCS staff, grant applicants, grantees, and peer reviewers to apply for, review, maintain, report on, and close out grants. The Gateway is accessed by CNCS staff through the CNCS Intranet site, and by others through the CNCS Internet web site.

Before accessing the eGrants Gateway, refer to the CNCS web site for information about qualifying for grants, and what information must be supplied in your application.

Although eGrants is accessed over the web, using eGrants is more like using Microsoft Word or Excel than using a typical web page. Think about the typical web-based systems you've used. Many of them are query-only – you go to a web site to find out the weather for a particular region, to get driving directions, or to read a newspaper or magazine online. You don't have to enter much information there – just the zip code for the region you're interested in, or the addresses your are coming from and going to. Even those web sites where you enter data are pretty simple – consider an order-entry system. You follow a series of prompts, and enter the items you want to order. You may change an item on your order before you finalize it (maybe the color or the quantity), but even in these circumstances, the amount of data you have to enter and possibly revise is quite limited.

This is decidedly not the case with the eGrants system. Requesting a grant requires a lot of data to be entered, including financial and narrative information. You may need to enter and review the information several times before it is even submitted. Then, after it's submitted, you may need to go back to an application, and modify something. These are capabilities that are not provided by most of the common web sites in use. Therefore, we need to take a different approach to the way the site works, to allow more flexibility in recalling information previously entered and possibly modifying it, over an extensive period of time.

To allow this sort of flexibility, eGrants offers the ability to not only enter new data when you sit down at the machine, but to retrieve data previously entered, in a different session, perhaps days, weeks or even months ago. (Try doing that with an airline reservation.) To support this requirement, eGrants offers a "query" capability in addition to allowing you to enter and save information. To use eGrants effectively, you need to learn how to use these functions.

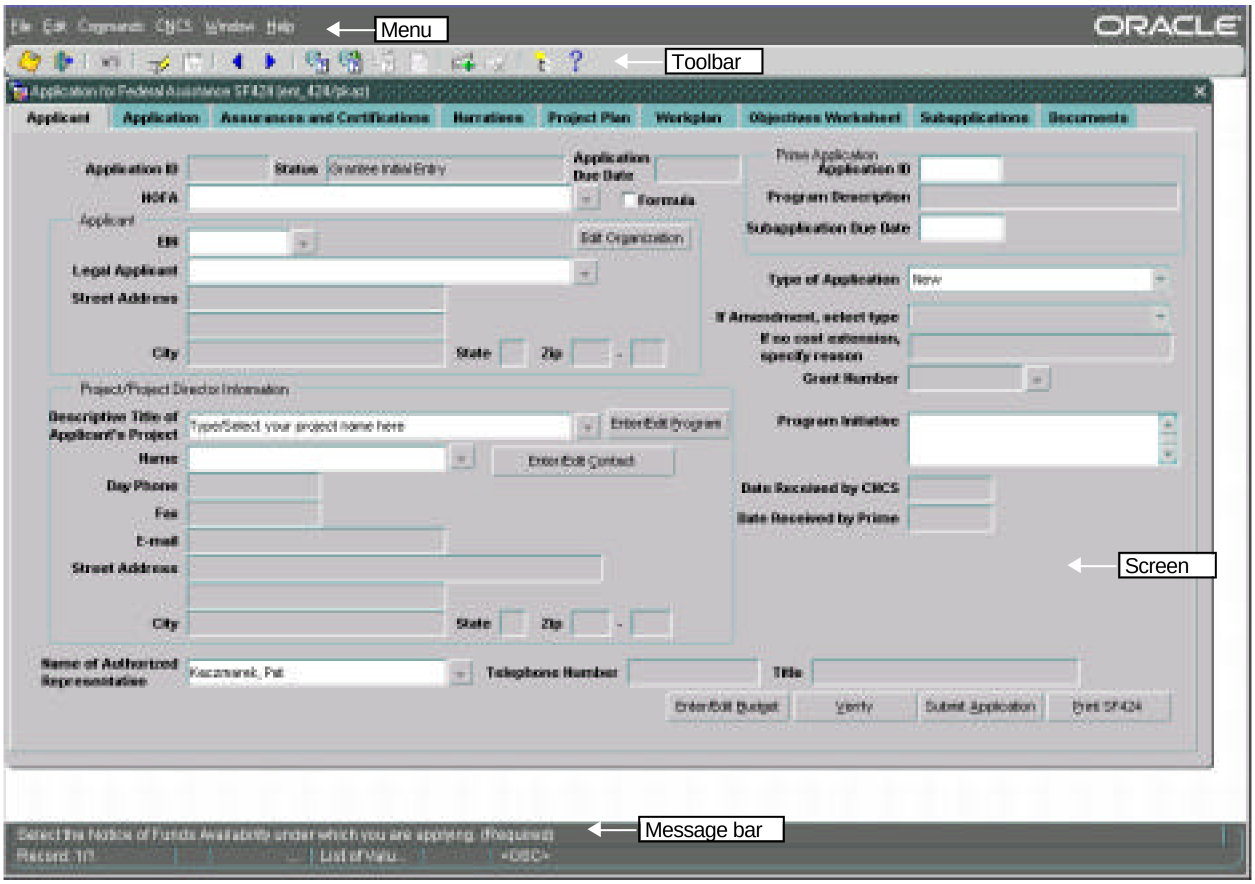
This document describes how to use the eGrants interface, enter new records, and query, modify, and save existing records. For information about the individual forms in eGrants, access the help files within each form or download the user manuals from the CNCS web site.

eGrants Forms

Forms in eGrants have four major sections:

- Menu
- Toolbar
- Screen
- Message bar

These are shown in the picture below.



Screen Objects

This section describes the objects on screens in eGrants and how they are used. Within this section, knowledge of basic Windows NT operations is assumed, including the use of point-and-click, menus, shortcut keys, and the cut, copy, and paste commands. All fields and objects can be accessed by using the mouse to click on fields, lists, and buttons. The keyboard can also be used to access fields and objects – use of the keyboard is described in the last section of this document.

Fields

The fields on a window are generally color-coded to indicate whether they are available for data entry or can only display data. If adding or editing a record, the background color of the fields that can be entered or modified will be white; display-only fields will be gray. A display field contains information that is looked up based on other information in the system or is the result of a calculation. It may also contain information that can only be modified by people with specific job types or in a different context. Display fields cannot be modified by the user. If entering a query, the fields that are queryable will be white; fields that cannot be queried will be gray.

Required fields must be filled in when entering or editing a record. The help message will indicate that the field is required.

Some fields must have values entered. Some required fields can be left blank initially, but must be completed in order to save a record. Other required fields have default values that will be used if no other values are entered. If you try to leave a required field that has no value entered, the cursor will remain in the field and an error message will appear in the message area at the bottom left of the screen, as shown below.

If you try to save a record and one or more required fields are left blank, an error message will be displayed in the message area, and the cursor will go to the first blank required field.

There are several types of data entry fields. To enter data in a field, either click on the field using the mouse or use the keyboard to move to the next or previous field as described in the last section of this document.

Single-line fields only allow one line of data to be entered.

Multi-line fields allow multiple lines of text to be entered.

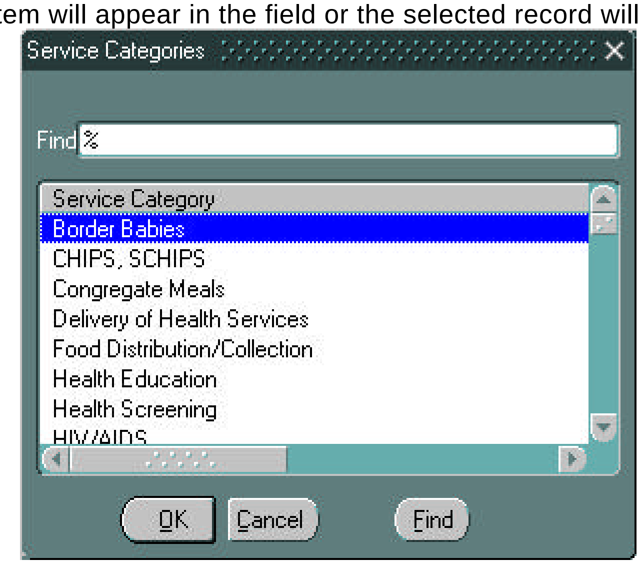
Multi-row tables allow you to enter data in a table, much like a spreadsheet.

Field-specific hints are included for all forms. When the cursor is in a field, information about the field will be displayed in the message area at the bottom of the screen. Explanations of error messages will also be displayed in the message area. You cannot tab into a gray field (except for the first field on a form), but you can click on the field with the mouse to view the hint. Field definitions are also included in the on-line help file.

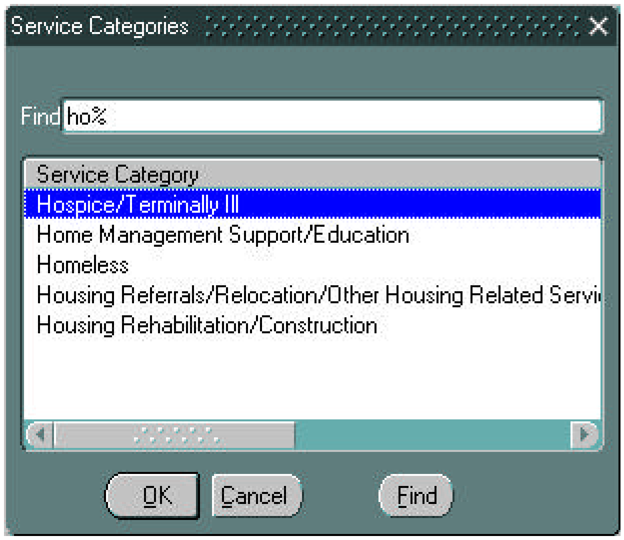
Lists

Two types of data entry lists are used in the grants management system to assist in data entry, data validation, and selection of options – a list of values (LOV) and a poplist.
A list of values is used for fields that have a specific set of allowable values. If a field has an LOV, there will be a  button next to the field. You can type an entry into the field; if the entry is valid or a partial entry corresponds to one and only one list item then the item will be displayed in the field when you move to the next field. Invalid entries will automatically open the LOV. Partial entries that correspond to more than one item in the list will open the LOV and display the matching items. You can also invoke the LOV by clicking on the  button or pressing the F9 key when the cursor is in a field with an LOV. When the LOV is displayed you can select an item from the list. The selected item is then displayed in the original field. A list values option is also found on the Edit menu.

To select an item from an LOV, either 1) highlight the item using the mouse or the up/down arrow keys, then click on OK or press ENTER, or 2) double-click on the line in the list. The list window will close and the selected item will appear in the field or the selected record will be displayed.



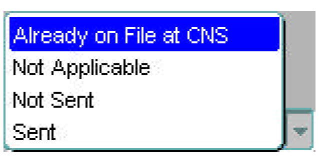
Some lists may have a large number of items. To filter the list (display only a subset of items) enter the filter in the box at the top of the list, using % as a wild card. Click on **Find**, and the list will display only those items that match the filter. For example, ho% will display all items that begin with Ho or ho, and %A displays those that contain A or a. Note that if you start typing after the list opens without clicking on anything, the list will automatically filter the entries.



An LOV is available on some forms that allow you to view list of all records that match a query (a search on the database). When you select a record from the LOV, that record will then be displayed on the screen. The use of LOVs with queries will be discussed later in this section.

A poplist is displayed on the screen as a single-line field with a down arrow attached to the field. If a value has been selected or there is a default value, it will be displayed in the field. To use the list, either 1) click on the field or the arrow to open the list, then click on the item you want in the list, 2) use the up and down arrow keys to move between items, then press ENTER to select the currently highlighted item, or 3) type in the first letter of an item in the list. If multiple items start with the same letter, continue to press that letter until the correct item is displayed.

 Poplist with no selection



Opened poplist

Poplist with item selected

After an item is selected, the list will close and the selection will appear in the field.

Buttons and Checkboxes

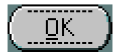
Buttons are used to open windows, create, save, and delete records, and enter and execute searches on the database. There are two types of buttons in eGrants. Some buttons have icons on them, such as those found on the toolbar at the top of every data entry window. Non-iconic buttons have a label on the button itself.

Buttons will be grayed out if they are not available in the current context. You will be able to activate a button in one of three ways:

- Click on the button once using the mouse.

- If the button is not iconic, press and hold the Alt key, then press the underlined letter on the button (Alt-V in the example shown).

- If the button has focus (dotted line around the button), press ENTER to activate the button.



- The functions for iconic toolbar buttons are available from the menu.

A checkbox is a box with a text label next to it. Mark a checkbox by clicking on it, just like checking off a box on a form. To place a "✓" in a checkbox, click once on the box. To remove a "✓," click on the box again. If the checkbox has focus, you can press the SPACE bar to select and deselect the box (a checkbox receives focus when you tab to it).

Toolbar

Each window in eGrants has a toolbar that allows you to add, save, and delete records, query the database, and access help. The toolbar is shown below.

When you initiate a query, the toolbar will change to include functions that are used in query mode and gray out inapplicable icons. The query toolbar is shown below.

The table below summarizes the functions on each toolbar. Detailed descriptions of all of the functions are provided in the following sections. Some functions may be disabled in data entry mode, depending on the module and the user's access.

Data Entry Toolbar		**Query Toolbar**	
Icon	**Function**	**Icon**	**Function**
	Saves the currently displayed record		Not available in query mode
	Exits the current form		Not available in query mode
	If new record, clears screen w/o saving; if editing, redisplays original record		Not available in query mode
	Opens a full screen text editor		Not available in query mode
	Opens a calendar, inserts selected date		Not available in query mode
	Displays the previous record returned by the query		Not available in query mode
	Displays the next record returned by the query		Not available in query mode
	Initiates a query		Not available in query mode
	Returns all records available to the user in the form		Returns first record matching query criteria
	Not available in data entry mode		Cancels the query and returns you to data entry mode
	Lists all records		Lists all records matching the query, if available
	Clears the screen for new record entry or inserts a new row into a list		Not available in query mode
	Deletes the currently displayed record or current line in a list		Not available in query mode
	Takes you to the main eGrants menu		Not available in query mode
	Accesses on-line help		Accesses on-line help

The toolbar will gray out those buttons that are not accessible under the current circumstances. For example, if the user cannot delete a record, the delete icon will be grayed out.

The menu also contains all of the functions found on each of the toolbars, as described earlier in this section.

Queries

A query is a request to the database to return records that match criteria that you specify. You can then look at the individual records on the screen. A query is performed by telling the form you want to enter a query entering information into the fields that you want to search on, and executing the query. Some forms will open in query mode, so you will simply being entering your query criteria.

To enter a query, click on the button. The toolbar will change to reflect the query functions.

Any fields on the window that can be queried will be white; those that cannot be queried will be gray. If all of the fields on the window are left blank, all records will be returned when the query is executed. You can enter a complete value in a field or use the % as a wild card and enter values that must be contained in the field. For example, to enter a query that will retrieve the record for a person whose last name is “Jones”, you can enter Jones, J%, or %on% in the **Last Name** field. You can enter value for more than one field. For example, you can also enter a value in the First Name field to query a specific person. If a list of values or poplist is available for a queryable field, you can select a value from the list when entering your query.

To display the first record returned by a query, click on the button. You can then click on the and buttons to scroll through the records returned by the query. To display an LOV that shows all of the records that match a query, click on the button. You can then use the LOV to select a particular record to view. To clear all fields in your query, click on the button.
Once you have executed a query, the data entry commands toolbar returns.

Adding and Editing Records

A limited number of forms allow you to create new records. For example, the Application for Federal Assistance (SF424) form allows you to enter a new grant application. If you can add a record, the icon will be enabled on the toolbar. To add a record, click on the icon, enter the appropriate information as described in the help for the form, and click on to save your entries. You must enter data in a field that is required, unless a default value is displayed. You can add new rows to many of the multi-row fields in a form. The icon will also be enabled if you can add a row. To edit an existing record, query the database and find the record you want to modify. Make the changes and click on .

If you are in the process of adding or modifying a record and cannot get out of a field, check the message area. The most common reasons that you cannot leave a field are that the entry is invalid (for example, you entered a character in a numeric field) or a required field was left blank.

Deleting Records

Deleting a record removes it permanently from the database. In general, there are very few records that can be deleted in eGrants. The Delete function is also used to delete lines in a list – many lists will allow this functionality for users that can enter or edit records. If a record or list line can be deleted, the icon will be enabled on the toolbar.

To delete a record, enter a query to retrieve the record you want to delete. Make sure that the record you want to delete is displayed. Click on .

To delete a line in a list, click on the line to delete, then click on . The line is removed, but the change is not saved until you click on . If you change your mind or accidentally deleted the wrong record, click on the button (revert). The entire record will be retrieved from the database again without changes.

Cancel

The (revert) button is used to cancel changes made to a record ***before*** it is saved. If you are entering a new record and revert, the screen will be cleared. If you are editing a record and revert, the original record will be displayed. If you had queried the database before starting to edit, the records matching the query will still be available.

Help

To access help, click on the button. A new browser window will open and display the help file for the form. You can print the information from your browser if you wish. Close the browser window when you are finished.

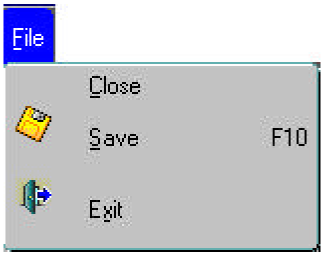
Menus

Menus are used to open windows and activate functions. The menus operate like all standard Windows menus. To use a menu with the mouse, click on the menu title to open the menu, then click on the item you want to select from the menu.

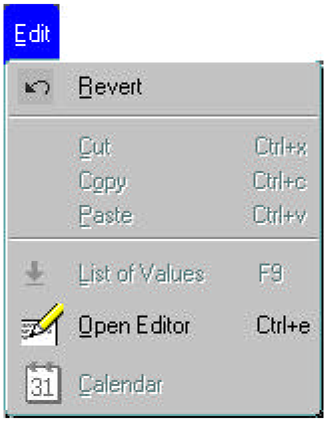
If a menu or menu item is enabled in the application's current status, the item will be black. If the item is not available, it will be grayed out.

The following menus are shown on the menu bar.

The **File** menu contains three commands. **Close** closes the current window but leaves eGrants open. **Save** saves any changes you have made. **Exit** closes all windows and shuts down the application. After you exit eGrants, you must separately close the Internet Explorer window.

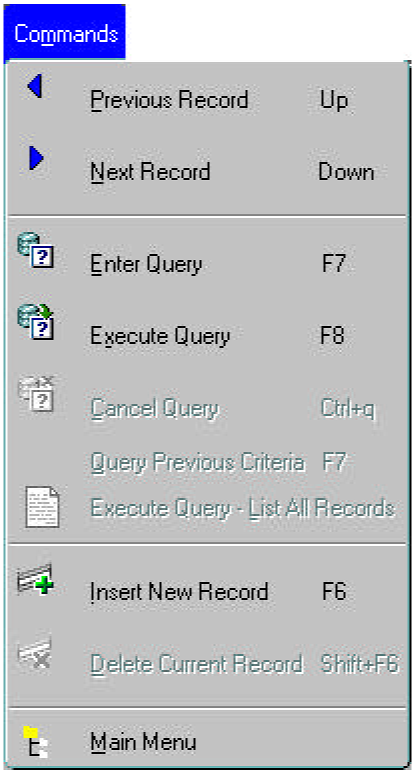


The **Edit** menu contains standard edit commands, such as Cut, Copy, and Paste. These functions can be used to copy text from a document and paste it into a field in eGrants. Four eGrants-specific menu items are available and are discussed in the next section.

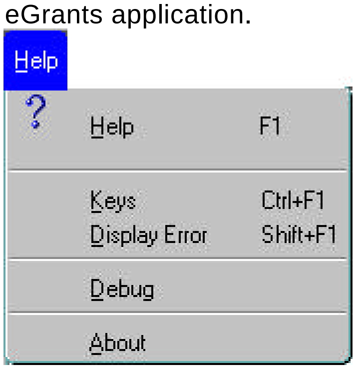


The **CNCS** menu is only available to CNCS staff, and only in certain forms. The functions of this menu are discussed in detail in a separate document on the CNCS Intranet.

The **Commands** menu contains query and data entry functions, discussed in the next section.



The **Help** menu allows you to access the online help for the form. The online help will be similar to the user manual text for each form. The Keys item shows the shortcut keys available for various functions. The user support team may ask you to access the Display Error or Debug menu item if you encounter an error while running the application. The About item displays information about the eGrants application.

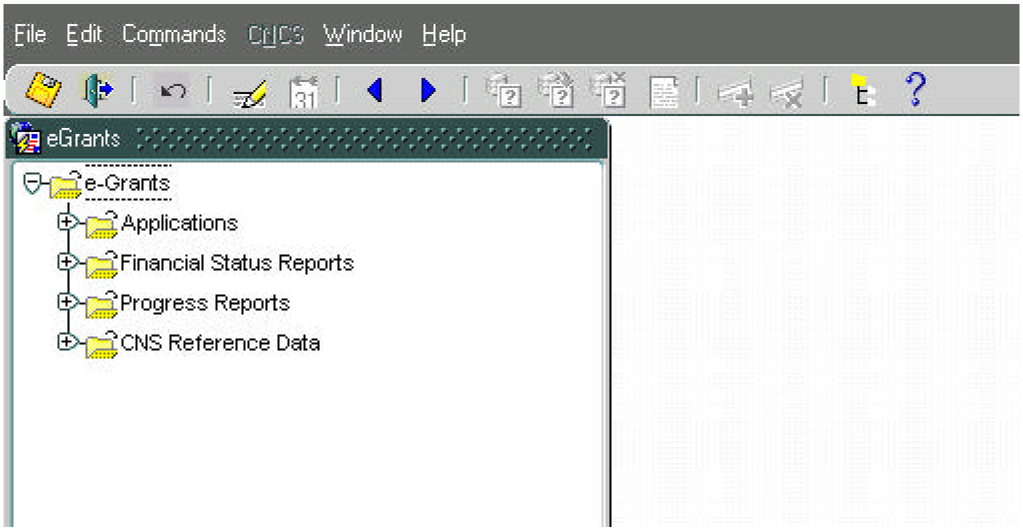


Tabs

Some forms have more than one screen, because all of the data cannot fit on a single screen. Tabs are used to easily access additional screens related to the current task. To move between tabs, click on the tab title.

Menu trees

Menu trees are used to easily navigate through multiple options. They are primarily used in two places; the eGrants main menu and the Budget entry form.



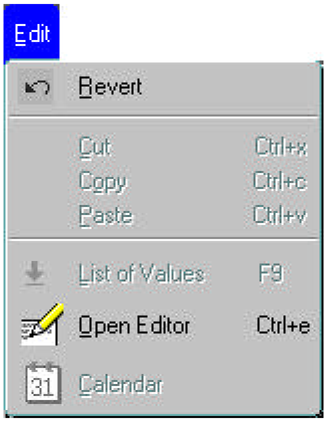
A menu tree consists of a hierarchical tree with multiple nodes or branches. To open a node, click on the + to the left of the node. Additional nodes and/or items will be displayed under the selected node. To open and close nodes using the keyboard, select the node to open or close, then press the Enter key.

Further details about the use of these menus are included in the module descriptions for those forms.

Using the Keyboard in eGrants

The keyboard can be used to move between fields and tabs, activate menus, and activate buttons.

- To move between single-line fields, press TAB or ENTER. To move back a field, press SHIFT+TAB.
- In a multi-line field (one which can have more than one line of text), to move down a line, press the ENTER key. To move to another field, press the TAB key.
- In a multi-row table, Press TAB or ENTER to move from left to right on a row. Use the arrow keys to move up and down rows. At the end of a row, press TAB or ENTER to move to the next row. If you are in the last row in a list, and you are allowed to create new rows in the list, TAB or ENTER will create a new empty row for you. To get out of a list, press Ctrl-page down (i.e., press and hold the Ctrl key, then press the Page Down key).
- To move between tabs, click on the tab title, or press Ctrl-page down until the appropriate tab is displayed. (Note that this may move the cursor within the fields on the tab first before going to the next tab, especially if multi-row tables are present.)
- All menu titles and items have one letter underlined (the “hot” key). Press the ALT key plus the underlined letter in the menu title to open a menu, then press the underlined letter of the menu item you want. You can also use the up and down arrow keys to select an item in the menu.
- Note that some menu items show function keys or Ctrl+letter keys that can be used to access the menu functions. All menu items with icons also show in the toolbar at the top of every form. In the example below, to open the editor using the keyboard you can either press the Alt key, then press “e”, then press “o”, or press and hold the Ctrl key, then press “e”.



Key Functions

The table below lists the key functions available in eGrants.

Function	Key
Block Menu	F5
Clear Block	Shift + F5
Clear Field	Ctrl + U
Clear Form	Shift + F7
Clear Record	Shift + F4
Commit	F10
Count Query	Shift + F2
Delete Record	Shift + F6
Display Error	Shift + F1
Down	Down
Duplicate Item	F3
Enter Query	F7
Execute Query	F8
Exit	Ctrl + Q
Insert Record	F6
List of Values	F9
Next Block	Ctrl + Page Down
Next Field	Tab
Next Record	Shift + Down
Next Set of Records	Shift + Ctrl + Page Down
Previous Block	Ctrl + Page Up
Previous Field	Shift + Tab
Previous Record	Shift + Up
Print	Shift + F8
Return	Return
Scroll down	Page Down
Scroll up	Page Up
Show Keys	Ctrl + F1
Up	Ctrl + P
Up	Up
Update Record	Ctrl + U